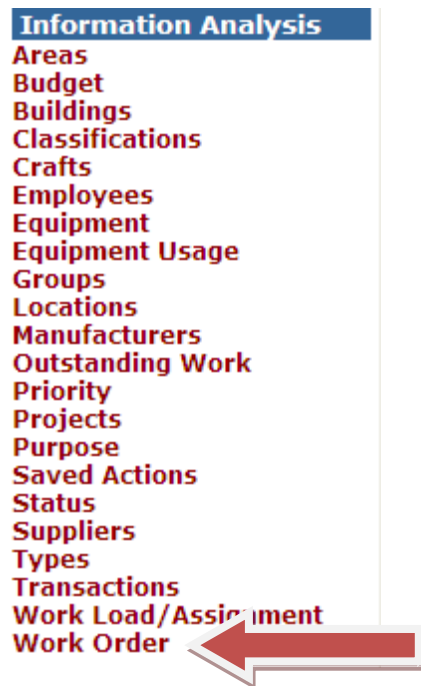


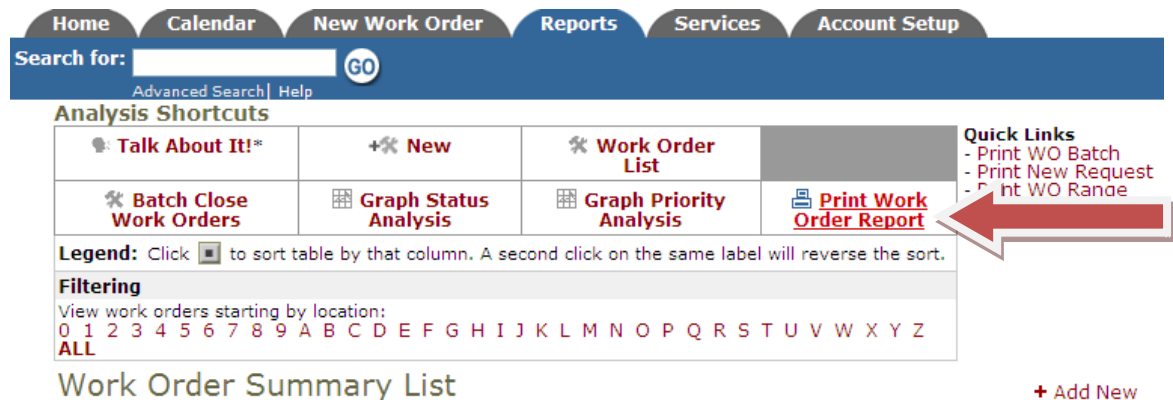
## Alaska CIP Report Quick Step Guide

### 1. Run a work order report in Maintenance Direct

**1A.** Click on the **Work Orders** link – located in the Information Analysis section on the right-hand side of the homepage:



**1B.** On the Work Order Summary List page, click on the link to **Print Work Order Report** – located in the Analysis Shortcuts section near the top:



**1C.** On the Work Order Report page (titled Your Work Orders by Status), select the desired information in each step. For a report on all work orders for the last fiscal year, follow these steps:

Step 1: Select the last fiscal year from the drop down box OR enter the custom Begin/End dates in the fields provided.

## Your Work Orders by Status

### 1. Select Your Reporting Period

2.

--Use Custom Date--

--Use Custom Date--

All

Today

Last Week

This Week

Last Month

This Month

Fiscal Year

Fiscal Yr Qtr 1

Fiscal Yr Qtr 2

Fiscal Yr Qtr 3

Fiscal Yr Qtr 4

Calendar Year

Calendar Yr Qtr 1

Calendar Yr Qtr 2

Calendar Yr Qtr 3

Calendar Yr Qtr 4

Fiscal Yr Ending 2008

Fiscal Yr Ending 2007

Fiscal Yr Ending 2006

Reporting date

on Date

te

1D. Leave Step 2 as Request Date:

### 2. Choose the type of reporting date:

- ☒ Request Date
- ☐ Requested Completion Date
- ☐ Target Start Date
- ☐ Target Completion Date
- ☐ Completion Date
- ☐ Deferred Date

1E. Skip down to Step 21 and check the radio button by -> Select Pivot Graph <-

Change the drop-down to Detail Analysis.

### 21. Choose a report type for viewing

☐ Summary Report

☐ Summary Report 2

☐ Summary Report 3

☐ Detail Report

☒ Detail Analysis

Status

Status

WOID

1F. Step 22 will default to Excel Spreadsheet:

**22. Choose a report format**

- ☐ PDF
- ☒ Excel Spreadsheet
- ☐ Tab delimited text
- ☐ XML



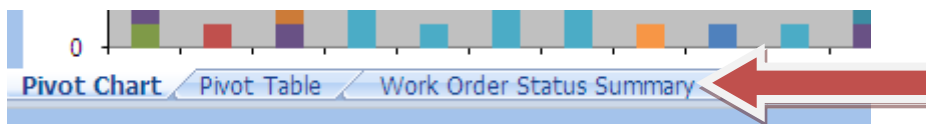
**Print This!**

**1G.** In Step 24, click on

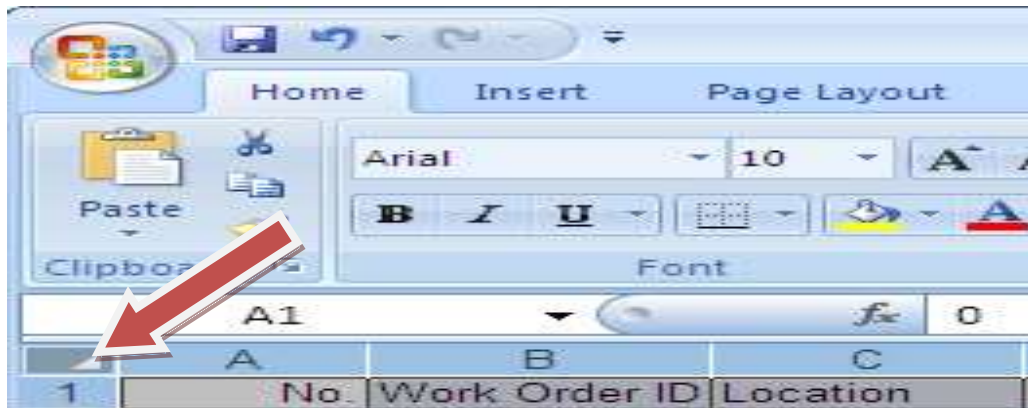
to open the Pivot Chart in an Excel

Spreadsheet.

**2.** The Excel Spreadsheet will have 3 worksheets attached. Open the sheet titled Work Order Status Summary by clicking on the title:



**3.** Copy ALL of the data (including column headings) from the Work Order Status Summary:



A quick way to do this is to click on the cell between Row 1 and Column A to highlight all cells. Then press CTRL + C on the keyboard to copy the data

**4.** Open the Alaska CPI Template spreadsheet and paste the data copied from the Pivot Report into cell A1 of the Data worksheet (this is the first of 10 worksheets):

You can use the same process described above, but in reverse. Click on the cell and press CTRL + V to paste the data copied from the report.

A1      fx      0					
		B	C	D	E
1	1	Work Order	Location	Building	Status
2	1	139			Closed Work
3	2	140			Closed Work
4	3	141			Closed Work
5	4	142			Closed Work
6	5	143			Closed Work
7	6	144			Closed Work
8	7	145			Closed Work
9	8	146			Closed Work
10	9	147			Closed Work

Worksheets 2A, Chart 2A; 2B; 2C; 3A, Chart 3A; 3B and Chart 3B will pull information from the Data worksheet to fill in the reports.

**NOTE:**

There are a couple of fields that will need to be modified on the CPI report template.

**PURPOSE CODES:**

The Purpose Codes in worksheet 2A will need to be modified to reflect the purpose codes being used in the account.

There are spaces for 11 purpose codes. If additional Purpose Codes are needed, right-click on the row number, then select Insert from the menu that appears. This will insert a new row.

Be sure to drag the formulas from the row above down into each cell of the new row so that the calculations are made correctly.

**LABOR AVAILABLE:**

Also on worksheet 2A, the total number of available labor hours for each month will need to be entered in the row labeled Labor Available.

**START DATE:**

The Start Date for the report will need to be entered on worksheet 2C (this is typically the first date of the fiscal year).

You can now save the file under a new name (ex. FY2008 CIP Report) for your location.

If you have questions or need assistance, please call our Client Service Center @ 877-883-8337 or send us an email to [support@schooldude.com](mailto:support@schooldude.com).